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Sent: 12/10/2013 3:29:11 PM
To: Paulo, Lisa (lisa.paulo@cpuc.ca.gov)
Cc: Paulo, Lisa (lisa.paulo@cpuc.ca.gov)
Bcc:
Subject: Formation of Workforce, Education, and Training Project Coordination Group

To all parties in R.13-11-005, R.09-11-014, A.11-05-017, R. 12-11-005, A.11-06-016, and other interested parties:

D.12-11-015 directed Energy Division to jointly create a research and evaluation plan with the four investor owned utilities (IOUs) as a high level blueprint to guide evaluation and study of the \$2 billion 2013-2014 portfolio of energy efficiency programs. The plan is intended to be a living guidance document which is refined and updated bi-annually as needed. The Energy Division and IOUs will share changes with stakeholders, at scheduled quarterly energy efficiency stakeholder meetings, and use public web pages, including the Public Documents Area to gather input on the status of the plan:

[Public Documents Area - Evaluation Roadmap](#)

As demonstrated in the link above, the emphasis in this plan is on research planning by sector/issue area, with more than a dozen chapters that frame recently-completed research and incremental needs for study in each area in the future. We look forward to continued stakeholder engagement as we scope, contract, and implement detailed research plans for studies identified in these sector chapters.

In support of the directives summarized above, Energy Division staff (Staff) is forming a Project Coordination Group (PCG) to help coordinate and assist the Commission in the development of research pertinent to identifying workable strategies and policies for ratepayer funded workforce, education, and training (WE&T) programs and activities. These training efforts are pertinent to the energy efficiency, demand response, and distributed generation industries. WE&T is one of the study areas included in the evaluation plan described above, also known as the research roadmap. The PCG will fulfill a similar role as the PCGs which have been formed as part of the CPUC's Evaluation, Measurement and Verification (EM&V) of Energy Efficiency programs, which were created for specific topic areas or research objectives as a forum for sharing information about evaluation priorities, objectives, strategies

and outcomes.

Prior to today, Staff has worked with the IOUs and Energy Division consultants to develop and revise the evaluation roadmap for WE&T. We believe we are at a point now where additional stakeholder input is needed in this process. For the first time, we are reaching out to the service lists to seek out PCG participants from interested stakeholders. These stakeholders have not participated in our WE&T evaluation roadmap discussions in the past and their input is being sought to help inform our related evaluation efforts. PCGs are meant to be an interface between Staff, consultants, the IOUs, and other stakeholders. The next deliverable we will be seeking PCG input on a proposal to revise the WE&T evaluation roadmap now that Energy Division consultants are under contract and ready to initiate this work. The PCG may perform any of the following activities, on an ongoing basis over the course of approximately one year, related to providing input to the WE&T evaluation roadmap activities:

- Brainstorming research gaps and priorities;
- Developing research plans and timelines;
- Study scoping;
- Presenting and discussing research plans and methods;
- Identifying and addressing data needs or issues;
- Discussing and presenting interim and final results, reports, or other work products;
- Advising Staff on the technical accuracy, study methods, and quality of reporting of those work products;
- Discussing how study results could be used for integrated demand-side program design, modification, implementation or approval; and
- Developing plans for follow-up research

The primary responsibility of this PCG is to assist Energy Division Staff (Staff) in implementing the WE&T research roadmap which identifies and summarizes the related studies identified as needed to support the development and design of WE&T programs and the policies/actions needed to support them. PCG members will provide input and expertise needed to guide the overall research process over the next year or more. This PCG will likely also oversee some or all of the individual research studies which are carried out as part of the research roadmap.

We are seeking individuals who would like to join this PCG. The PCG is expected to begin its work in January 2014, and will continue for at least one year. We are seeking volunteers who (1) have some expertise and experience in the subject area of the study, (2) can make a commitment to continued involvement over the a minimum of one year, (3) can attend one or

two meetings per month (of one to two hours duration, by phone), and (4) respond within one to two days to email from the group seeking input or information about the relevant studies. Any emails or meeting notices associated with the PCGs' work will be sent only to PCG members. Note that any individual that participates in a working group **will not be permitted to bid on any RFPs** associated with or resulting from the related research efforts. In addition, if an employee of an organization participates in a working group, that organization will not be permitted to bid on any RFPs associated with or resulting from this research effort. Potential volunteers should also note that it is likely, that they will be asked to sign a confidentiality agreement, if any of this work requires access to the details of a study which uses confidential data.

If you would like to participate in this PCG, please submit a brief one page statement of qualifications explaining how your work and experience can contribute to the group. You may also submit a resume and/or references. Each participant must be able to demonstrate his or her basic familiarity with and expertise regarding: contractor skillsets and qualifications needed in the Energy Efficiency, Distributed Generation, and Demand Response industries; current research, policies, and issues related to workforce development for these industries such as specific knowledge about certification requirements, labor shortfalls / overages for particular sectors, job quality, workforce demographics, installation quality, gaps in needed skillsets and resulting impact on energy savings / generation, costs associated with certification requirement, etc. To manage the size and productivity of the group, as well as to achieve balance and optimize the benefits of the perspectives and expertise, this PCG shall be made up of representatives from each of the following four categories, although the make-up of the PCG may change based on the response to this invitation:

- Two members from non-profit consumer groups;
- Two members from non-profit energy, environmental, or academic organizations;
- Six members from for-profit service or equipment vendors (two from each industry; energy efficiency, demand response, and distributed generation); and
- Two members from for-profit consulting firms.

In addition, there can be one representative from each electric/gas IOU (each IOU can also nominate an alternate representative). If there are more than two volunteers from any of the above categories, Staff will ask organizations with common interests or perspectives to join together in nominating one person to represent them. Guidelines for communication and clarification regarding roles and responsibilities will be discussed and agreed to at the first meeting of the Project Coordination Group, tentatively scheduled for mid-January. Please submit your statement of qualifications by **December 31, 2013** to Lisa.Paulo@cpuc.ca.gov.

Due to the multiple service lists included in the notification, we apologize for duplicate transmissions that may have occurred.

Lisa Paulo

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